



FINANCIAL
PLANNING
ASSOCIATION

DALLAS
FORT WORTH



2024 Scholarship Program

Overview

The mission of the Financial Planning Association of Dallas/Fort Worth is to foster excellence in the practice of financial planning and to promote the value of becoming a CFP® professional.

There are two types of merit-based awards available, and financial need is not a consideration. An applicant may be considered for both types of awards with one application. Scholarships are awarded to those who have not already secured alternate scholarships for the same expense.

The decision to award these scholarships shall be made at the full discretion of the FPA-DFW Scholarship Program Selection Committee. All applicants are responsible for reading, understanding, and abiding by all of the guidelines.

Each recipient will be invited to attend the 2024 FPA DFW awards ceremony in Dallas in October. This is not a requisite, but we hope recipients are able to join.

Type 1: CFP® Exam Fee Scholarship

This scholarship entitles the recipient to an \$825 merit-based CFP® Exam reimbursement. All awards will be paid in arrears once all criteria have been met including passing the exam. No partial awards will be granted.

Type 2: CFP® Exam Preparation Scholarship

This scholarship entitles the recipient to up to \$1,400 toward the enrollment cost of a CFP® Exam Preparation review course. It is intended to reimburse the applicant only for the actual enrollment costs and the cost of study materials -- not travel, meals, calculators, or other expenses of attendance. All awards will be paid in arrears once all criteria have been met.

Scholarship Funds Available for Scholarship Awards

Dennis Carpenter, CFP® Merit Scholarship

Peggy Everson, CFP® Memorial Merit Scholarship

Pamela Yip Memorial Merit Scholarship

E.W. "Woody" Young, CFP® Memorial Merit Scholarship

SFMG Wealth Advisors Merit Scholarship in Honor of Barry Evans, CFP®

Eligibility

To be eligible for any scholarship award, **all** of the following qualifications must be met:

1. Currently enrolled in, or graduated from, a financial planning degree or certificate curriculum administered by an accredited university/program (registered with the CFP Board). To verify a program is registered, visit the CFP Board web site: <http://www.cfp.net/>. The candidate's graduation date must be after November 30th of the year prior and before August 31st of the current year to be considered (e.g. **2024 applicants must have a graduation date, or anticipated graduation date, after 11/30/2023 and before 08/31/2024 to be considered**).
2. Connection to DFW as defined by at least one of the following options:
 - a) University/program where CFP® education completed located within Texas
 - b) Living in Dallas Fort Worth metroplex and completing an online CFP® university/program

Dallas Fort Worth metroplex includes the 13 North Texas Counties: Collin, Dallas, Denton, Ellis, Hood, Hunt, Johnson, Kaufman, Parker, Rockwall, Somervell, Tarrant and Wise.

3. Intention to take all required courses for the CFP Board's certification examination and fulfill all requirements to become a CFP® professional. Note that preference will be given to candidates who intend to practice in the field.
4. Complete and submit the application package (see details in Application Package).
5. For the CFP® Exam Fee Scholarship (Type 1): Pass the CFP® Exam any time between January 1st of the year of application and December 31st of the year following the year of award and submit proof to the FPA-DFW Scholarship Committee (e.g. **2024 award recipients must pass after January 1, 2024 and before December 31, 2025**, to receive their scholarship payment).
6. For the CFP® Exam Preparation Scholarship (Type 2): The award can be claimed only once **between January 1, 2024 and December 31, 2025**. To claim award, recipients must provide the prep course receipt. Passing the exam is not a requirement of this award.

Application Package

Items to submit to the Scholarship Committee:

1. Completed application
2. Two letters of recommendation from professors or CFP® professionals in good standing
3. Original course grade transcript or equivalent

Please email the completed application package to:

FPA-DFW Scholarship Committee
Attn: Hannah Szarszewski, Chair
scholarship@fpadfw.org

The application package must be emailed on or before: April 23, 2024.

The Selection Committee is not obligated to consider partially completed application packages. Application documents received after the deadline date above will be considered incomplete.

Certified Financial Planner Board of Standards, Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and federally registered CFP (with flame design) in the U.S., which it awards to individuals who successfully complete initial and ongoing certification requirements.



2024 Scholarship Program Application

You may type or write *legibly* to complete this application, **BUT PLEASE DON'T ALTER THE FORMAT.**

Please indicate the scholarship(s) for which you are applying. You may select just one or both. By applying for a scholarship, you are attesting that you have not already been awarded a scholarship for the same expense from another source. Available reimbursement by your employer does not count as a scholarship.

- Type 1: CFP® Exam Fee Scholarship**
- Type 2: CFP® Exam Preparation Scholarship**

First and Last Name: _____

Current Address (Street, City, State, and Zip): _____

Permanent Address (if different from current): _____

Preferred Phone Number: _____

Email Address: _____

CFP Program in which you are currently enrolled or graduated from:

Expected graduation date: _____

If you plan to take a review course before the exam, which course is it?

How do you fulfill the connection to DFW requirement?

How do you intend to use the CFP® certification in your career?
__Practice __Teach __Other

How did you hear about the Scholarship Program? Please check all that apply.
__FPA DFW website
__FPA DFW Career Day
__Coworker/Friend
__Professor
__Other (Please describe): _____

Academic Background: Other than the answers provided above, have you earned any additional degrees?

Institution	Degree or Certificate	Year	GPA

Current & Previous Employment: Please list your employment history for the past five years.

Employer	Dates	Street/City/State	Position/Responsibilities

Professional Achievement: Please list any professional achievements for the past five years.

Type of Award/Honor	Year	Name of Organization

Community Service: Please list any community service activities for the past five years.

Type of Community Service	Year	Nature of Involvement

